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ABSTRACT

This report describes a project undertaken with the San Francisco Unified School District (California) to develop a process and approach to the development of instructional materials for limited-English-speaking students and training and support materials for their teachers. The report outlines the following aspects of the project: the role of the technical team (formation, deliberations, and conclusions); the proposed process for assessing instructional materials needs, including review of past efforts, structure for decision-making, and identification of key issues; specific procedures, tasks, and products, in chart form; the final production of instructional and curriculum materials; and issues to be considered in adoption and institutionalization of the results, implementation policy, and the mechanics of adapting the resulting process/approach to development of materials in other areas of need (other language groups, grade levels, or subjects). A checklist for this adaptation process is provided. (MSE)

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A PROCESS/APPROACH TO BILINGUAL EDUCATION INSTRUCTIONAL AND TRAINING MATERIAL DEVELOPMENT

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SYNOPSIS

This report covers several key elements in the delineation of a process/approach for developing bilingual education instructional and training materials in an urban school district.

The first section describes the role of the Technical Team which was crucial in all project deliberations and conclusions. The following items are included in this section:

(a) who the Technical Team members are, how they were identified and how they were trained;

(b) what the Technical Team discussed, when and with which resources;

(c) what the Technical Team decided concerning the priorities and focus for developing bilingual instructional and training materials for the San Francisco Unified School District.

The second section describes the proposed process including the major steps recommended for an urban school district. Discussed in detail are the following:

(a) the importance of and procedures for assessing needs at various levels and reviewing previous efforts at bilingual materials development;

(b) the creation and role of a deliberating and decision-making structure for bilingual materials development;

(c) the identification of key issues and variables in the process of bilingual materials development;

(d) a process/approach flow chart showing the interaction of process variables in an urban school district.

The third section identifies major issues which must be anticipated at the point of implementing the process. The issues selected are internalization and adaptation. Adaptation is discussed in terms of both mechanics and an implementation checklist.

Finally, the report includes appendices which enable the reader to assess and act upon major process steps with the help of suggested forms and charts.

INTRODUCTION

This report reviews the efforts and findings of Naomi Gray Associates, Inc., (NGA) with subcontractor, U.S. Human Resources Corporation (HRC) and the San Francisco Unified School District (SFUSD) in developing a Process/Approach for Bilingual Education Instructional and Training Materials development. The history of the project, from the proposal stage to preparation for actual materials development to initiating field testing will be traced, as will project relationships and the development of training strategies and implementation policies.

Before assembling the actual working teams (the Technical Team, the Review Panel, Field Site Teachers) and prior to submitting its proposal, NGA conducted a curriculum needs assessment of the SFUSD to determine where the greatest need lay for Limited English Proficient (LEP) students within the district. It turned out that LEP students in the middle school grades (6-7-8) had very little in the way of adequate curriculum materials in the subject area of Social Studies. Further, given that Spanish speaking LEP students represent a substantial population in the San Francisco Unified School District and in other urban school districts, it was decided to center the project's focus on this LEP student. In this way, the SFUSD would be serviced directly, other urban areas could also benefit with minimal modification and the process could be later replicated with other language groups.

A second factor in selecting the Spanish speaking LEP student as a focus was that many types of Spanish bilingual instructional materials have been developed, although the materials developed in the past for these students have been inadequate on many levels. This factor was attractive in that it would allow the project teams to review and critique existing material before beginning curriculum materials development and develop a model of bilingual instructional material that would be most appropriate for the population of urban Hispanic LEP students.

We are pleased to have had the complete cooperation of the SFUSD, the Mayor's office and local language minority community groups and associations. Naomi Gray Associates conducted extensive interviews with administrative personnel of the SFUSD in planning our proposal. These meetings and subsequent discussions with teachers, counselors, bilingual education resource staff and community association representatives produced a focus and plan of action which should enhance both the bilingual education efforts of the San Francisco Unified School district and of bilingual education in general.

ROLE OF THE TECHNICAL TEAM

FORMATION OF THE TECHNICAL TEAM

SFUSD Assistance

As outlined in the contract proposal, we envisioned an "ideal" technical team representing a variety of educational perspectives. The actual formation of the Technical Team involved a number of preparatory steps. It turned out to be a fairly direct chain of events beginning with contact with the Superintendent of the San Francisco Unified School District (SFUSD) and ending with the formation of a working team (the Technical Team) composed of four bilingual middle school teachers and two administrative personnel from the Department of Bilingual Education.

After talking with Dr. Robert F. Alioto, Superintendent of San Francisco Unified School District, who gave his support and direction, we were sent to Mr. Albert Cheng, Coordinator for the Department of Bilingual Education. Mr. Cheng was very enthusiastic about the project and saw it as an opportunity for immediate enrichment and further development of effective bilingual instructional materials. Mr. Cheng agreed to serve in a resource and facilitation role, but because of his many responsibilities for running the entire department (there are over 30 different language groups in the SFUSD), directed us to two key people in the department for closer involvement -Nick Bartel and Franklin Courtade.

Recruitment of the Technical Team:

Franklin Courtade had been a bilingual teacher, but was then a newly appointed administrator in the bilingual department. He agreed to work primarily as a liaison between Dr. Cheng's office and the project, but eventually also became a regular member of the working team.

Nick Bartel is a former bilingual teacher and is presently a prime bilingual curriculum developer and ESL expert in the department. Nick Bartel was, quite candidly, invaluable in the process of establishing an excellent Technical Team, in facilitating arrangements and resources within the district and in ongoing work with the Technical Team. He was a key resource, knowledgeable about the district's workings, sensitive to the needs of the immigrant student, and strong and eager in his committment to the project. As one of the few district personnel producing curriculum materials, he was anxious to involve others, with the hope that this might develop as an on-going process within the district at the end of the contract period.

Nick and Franklin worked very closely with the project staff (Naomi Gray Associates, Inc. and sub-contractor, U.S. Human Resources Corporation) to develop a strategy for recruiting qualified individuals for the Technical Team and for identifying how many and which schools would be included for the project focus.

The following four schools were identified as the only middle schools having substantial Spanish bilingual programs: Potrero Hill Middle School, James Lick Middle School, Everett Middle School and Horace Mann Middle School. Franklin and Nick suggested the names of several teachers from each of the four schools. A bilingual counselor and an involved parent from different schools were also suggested as possible participants.

An initial orientation meeting was called to which these teachers the counselor and the parent were invited, along with other interested teachers involved in bilingual education. As originally envisioned the Technical Team was to be composed of two teachers from each school, a parent and a counselor, with Nick and Franklin serving as consultants. This did not turn out to be feasible however, and we learned that flexibility is critically important in the process of establishing a Technical Team. The process must depend upon a voluntary commitment, and "more" is not necessarily "better" nor conducive to the sort of unity of purpose desired in this undertaking.

At this first meeting several people appeared who were not on the "prescribed list." In addition, a number of people who were expected did not appear. Two Filipino teachers attended who were eager to find a way toward better curriculum materials for their classes. Both the identified parent and counselor were unable to

attend and were both invited to the next meeting. They eventually formally declined from participating because of conflicts in their schedules.

Membership

Of the teachers who appeared at the first orientation meeting, four volunteered for Technical Team service (one from each school) and three agreed to be field test site teachers. We aimed for an even distribution of two teachers from each of the four schools, but this was impossible because two of the schools had only one teacher covering bilingual social studies. We felt that an even distribution would be extremely important in order to achieve a fair representation and as a basis for a sound evaluation.

The Technical Team was originally envisioned for larger membership but since the parent and the counselor had to decline participation and the Technical Team process was already well underway when it became clear that these two people would not be able to join, we decided to put it to the Team members to recommend further membership. The idea of getting a linguistic expert was considered but rejected, another counselor was suggested, but was also unable to find adequate time to participate. The last possibility was a bilingual teacher trainer from San Francisco State University. She was invited to join and expressed interest, but ultimately had to decline because her class schedule was in direct conflict with the times the school district personnel could meet.

Thus, the Technical Team was comprised of its "original starters": One teacher from each of our four target schools, Nicholas Bartel from the Bilingual Curriculum Resources Department and Franklin Courtade, from the Bilingual Education Department Administration. The members of the Technical Team are described below:

- Sandra Calvo, a new appointee to Everett Middle School, has just completed her Master's degree at Stanford University. She, like the rest of the Spanish bilingual teachers, has no specialized training in social studies per se, but has good generalized training having taught social studies along with other core subjects. She is a real improviser, strong in both energy and ideas. Sandy devotes herself 100% to her work and goes far beyond her basic duties as a teacher by involving herself in many after school projects and special task forces.

- Roberto Lemus is also a newcomer to both his school, Horace Mann Middle School, and to the subject of social studies. Roberto had been a high school science teacher, but was given this new assignment because of Horace Mann School's need for bilingual instructors. He is adjusting to three new variables: new school, new subject matter and younger students. Roberto is gentle, wry, and extremely hard working.

- Manuel Colon (at Potrero Hill Middle School) is a veteran teacher of many different grade levels, with expertise in a number of different subjects. Manuel is a kind of "renaissance man" and often spoke of having to adapt to different types of class compositions, always looking for the best means of impacting upon his students. Manuel is our "philosopher"; a vehement and energetic humanist.

- Lidia Baranda-Larin of James Lick Middle School is also a teacher of experience. She presently elects to teach only part-time because of a small child at home. She works within a mixed grade format. Again, social studies is secondary to her bilingualism as a qualification. Lidia is sensitive, sympathetic, intellectual and also exhibits a good measure of political saavy.

- Nick Bartel is the least bureaucratic administrator one could ever imagine encountering. As already mentioned, Nick has had years of service as a bilingual teacher, and is proficient in English, Chinese, Korean, and Trukese. Nick has been involved in curriculum development for the past several years, generating relatively small informational units for classroom use and one major work, The Story of California, which is being translated into several languages (Chinese, Spanish, Vietnamese, Laotian, Cambodian, and Burmese). Nick's sympathies are with the classroom teacher and thus he does not set himself apart or above the rest of

the team, but functions as an equal. Committment to improving conditions for the immigrant student is clearly his overriding concern.

- Franklin Courtade had been a Spanish bilingual teacher at Potrero Hill Middle School until this year. Thus, although he is now an administrative aide to Mr. Albert Cheng, Coordinator of the Bilingual Education Department, he is still close to the needs of teachers and aware of the tremendous gaps in materials for the bilingual student. Franklin is personable and caring and ably represents both administrative concerns and the needs of the classroom teacher.

We felt in many ways "lucky" to have happened upon such committed and knowledgeable individuals for the Technical Team. Each of the team members exhibited tremendous energy and concern for this innovative project. It would be impossible to single out an individual who contributed more than another; there was really a remarkable equality in the amount of work contributed at the meetings.

When we tried to analyze why this Team worked so well, we came up with three possibilities, none of which are mutually exclusive: 1) Recruitment was conducted on a voluntary basis; those who participated <u>wanted</u> to be there. 2) Our Team was heavily comprised of teachers; this is the role which most often feels the impact of

inadequate materials and is most immediately moved by the plight of this often "lost-in-transition" student. Yet the Team did not lack knowledge of district regulations and Administration concerns which were available through our two administrative members. 3) The third possiblity, as already mentioned, is that we were quite simply, lucky to have found people of such high caliber and dedication. The Team composition demonstrated a balance of experience and openness to new ideas, as well as commitment to the needs of students.

The size of the Team turned out to be just about ideal. There were sufficient numbers to allow diverse opinions and contrasting ideological input (Nick wanted practical unit planning; Manuel wanted the primary concentration to be on adolescent development; Roberto was concerned about utilizing student energy through group activities, etc.) Yet the group was small enough to provide a sense of cohesion and the development of personal relationships. We had almost no absenteeism which, we believe, was a result of the relatively small size of the Team, one in which each person felt needed and responsible.

Orientation and Training

The first two meetings we held were orientation meetings, yet were also set up for Technical Team recruitment. At both of these meetings, the focus and scope of the project were described in

detail, from the Department of Education's concept of a new process for developing bilingual curriculum materials, to our proposed plan of action for the San Francisco Unified School District.

We exhibited a flow chart diagramming the relationships between the Department of Education, the San Francisco Unified School District, Naomi Gray Associates (contractor), and U.S. Human Resources Corporation (sub-contractor). All personnel were named, with explanations of their roles and functions. The concept of the Technical Team as the working, policy-making body of the project was described. The role of the field site teachers was described as the group who would later join the Technical Team in curriculum materials development and field testing. The Review Panel was explained as the body who would provide expert guidance and review our progress at various points in the contract.

The concept of developing a Process/Approach required a good deal of explanation in these first meetings. We explained our understanding that the Department of Education, in looking for more effective ways to service the bilingual students in this country, saw the need to involve persons from school districts in looking at how to best do this. It had to be stressed repeatedly that what this contract is about is <u>not</u> simply developing instructional materials, but about developing a new mechanism, better than what has existed, to determine the best ways to service the ever-increasing population of immigrant students. By including, and actually centering upon, classroom teachers as the people who

have the most direct experience with these students, the Department of Education looked to creating more effective materials, materials which would actually "work" with the students (rather than the sometimes "ideologically pure" materials which are created away from the classroom experience and have inefficient or impractical pedagogical use).

It was explained that identifying a new Process/Approach for the development of curriculum and instructional materials was the first (and in many ways the most important) phase of this contract. Time-lines for project objectives were freely shared with the orientation group in order to illustrate as concretely as possible the different phases of the contract, beginning with the development of the Process/Approach.

We held an open forum section during each of the two orientation meetings, at which time the teachers expressed the myriad of difficulties they face in implementing a bilingual methodology in their classrooms. Many expressed the difficulty of teaching in a class composed of so many different levels of language (both native language and English literacy). Others talked about being assigned students of different ages and developmental stages to be contained in one classroom. Virtually everyone spoke of the lack of bilingual curriculum materials for the middle school child. What became immediately clear was (a) the bilingual classroom varies in its student composition from school to school (b) there is no

standardized instructional format throughout the district and (c) aside from a few district-generated units most teachers have to gather whatever materials they can, or make their own materials and generally improvise.

After a full question and answer period, we called for volunteers for the Technical Team and Field Site Teachers. We discussed the amount and kind of time required for participating in each group and we explained that this project would require after-school and occasionally a full day's involvement. Compensation, in terms of an honorarium for after school meetings and substitutes for full day meetings as well as possible university credit, was also announced.

Orientation of the Technical Team to this project required two comprehensive sessions. The concept of developing a Process/ Approach was not easy to deliver. These teachers and administrators expressed such an urgent need for better materials that it was sometimes difficult to keep them focused on developing the "process" first. Throughout this first phase there was a definite pull between the Team's wanting to start on materials development and the project staff directing the Team to work on the "process" prior to working on the product. Although the Team's anxiety was understandable, we had to keep reminding them that we needed to study many issues and invent a new and different approach so as to avoid many of the limitations of a "publishing house approach" which have not worked well in the past.

After the first orientation sesions, regular Technical Team meetings began in earnest. The Team met every month, usually two to three times. Occasionally we would experience a break in understanding, necessitating our having to to reiterate some of the information given during orientation. Gradually, with facilitation, the Team became more comfortable and focused on the Process/Approach, yet the undercurrent of impatience to get to material development never disappeared entirely.

Project Staff Roles

The staff decided early on to limit itself primarily to facilitating and general guidance in the Technical Team deliberations. We saw this project as one which was designed to utilize and capitalize on the experience of the classroom teacher and allied personnel. We did not see it as our role to determine what the ultimate materials development process would be and then impose it on the various working groups (Technical Team, Field Site Teachers and the Review Panel). We tried to be as clear as possible that (a) the central premise of this program is the development of a process, and (b) while the process cannot be defined in detail beforehand, it can be described in general terms.

The Project Staff suggested topics that the Team could explore, brought in consultants to help the team consider certain issues in more depth, recorded their progress, and always tried to keep the team focused on their primary task of developing the Process/ Approach.

In an effort to allow the Technical Team greater autonomy, we began to set meeting dates and frequencies with them (rather than for them), and encouraged a different Team member to chair each meeting. The Project Staff would design a tentative agenda with objectives for each meeting, yet these agendas were subject to alteration given what the team felt to be the greatest priority at that time. Sometimes compromises were made. The Team expressed a sense of self-consciousness about "observing itself in the process of creating a process" (one team member described it as "how can you swim, having to watch and describe yourself swimming?"). When that occurred, staff left the Team to talk about some concrete issues concerning curriculum development while we observed and recorded their "process." We did not set ourselves apart and contributed freely to all discussions and planning, yet we tried not to lead too directly.

The project staff met weekly to plan for the Team's next meetings, to consider training techniques, to analyze the progress made at the previous meetings and to record significant steps and findings of the Technical Team.

DELIBERATIONS OF THE TECHNICAL TEAM

Schedule of Meetings

The Technical Team meetings were not easy to schedule. In addition to the crowded nature of the regular calendar, consideration had to be given to Nick and Franklin's various administrative duties/

meetings and the fact that three members of the Team were going to school after work hours. We were, however, able to schedule fairly frequent meetings, and when those meetings were scheduled there was never any change and little absenteeism. We held the majority of the meetings at the various participating schools on a rotating basis. The two all-day meetings were held at (a) a church facility and (b) at the office of the Department of Bilingual Education (because of a predetermined plan to look at the district's collection of textbooks and supplements). We also held two half-day Saturday sessions at the contractor's office, which provided a pleasant respite for the Team from conditions at the school sites.

Issues Discussed and Use of Consultants

During early project staff planning sessions and during several of the longer Technical Team meetings, we employed the services of Jon Sagen, a graphic recorder with excellent facilitation skills. Jon was able to help us plan the entire 30 month life of the contract which he illustrated in charts which we exhibited to both the Technical Team and the Review Panel. He was also most helpful in isolating pertinent issues for discussion, since the Technical Team meetings were usually complex and not always organized into specific topics for specific sessions.

The following is a list of what were determined by the project staff and the Technical Team as necessary topics for the process/ approach discussions.

Established Curriculum Policy
Student Needs
Teacher Needs
Resources
Decision Making On Curriculum Materials
Production Processes
Training and Dissemination
Utilization/Evaluation/Modification

After the initial meetings to orient the Technical Team to the project focus, the Team began to anlayze the problems that they face in the school district and in their classroom experiences. These considerations often led to very moving discussions of the plight of the immigrant student. Beyond the readily acknowledged fact that there is not enough material for this student, came the problems with what does exist. Sometimes existing materials use such elementary language that it is next to impossible to convey anything of real interest to the student. The students are also sensitive to the appearance and level of their texts; they want "real" books for their sense of self-esteem. Some materials are really nothing more than straight translations of English texts which do little to relate to this student's life experience. The

Technical Team was unanimous that of nearly all of the instructional material for this age student (regardless of language ability) does not take into account the developmental stage and needs of early adolescence.

The Technical Team decided after the first course of its deliberations to make this project an opportunity to do something special and unique. They saw this as an opportunity to have an impact on this student in a more personal way, tapping the student's experiences and designing material appropriate for and inclusive of the early adolescent. To this end, the Team had many in-depth discussions both of immigration and adolescent development. A mental health consultant, Dr. Mario Acosta, was brought in to discuss adolescent development from a psychosocial perspective and to share some of his experiences in working with recently arrived Hispanic children and their families.

Other issues the Team discussed were the problems the child faces in the clash between the new, often more permissive environment, and the traditional, Latin home environment and how schools can increase parent involvement. Different teaching methodologies and formats were explored; a constant issue was what and how much should be taught in the native language and how much in English. Techncial Team members attended a lecture given by Dr. Stephen Krashen, a linguist from the University of Southern California, on first and second language acquisition. This was extremely

pertinent for the Team's deliberations. Also considered were the practical questions of what is feasible in terms of district resources and guidelines.

Review of Literature/Materials

A search of the literature was made to identify all relevant instructional material already in existence for the subject and grade levels being considered, as well as materials development processes designed to produce bilingual/ESL instructional materials. This search was conducted to include information relevant to the development of both the Process/Approach and instructional materials.

The focus of the literature search was identified as:

a. Social studies materials designed for use by Limited English Proficient (LEP) students, whose first language is Spanish, at grade levels six, seven, and eight (middle school),
b. Any descriptions of procedures for developing bilingual materials, particularly for (a), and
c. Any feedback on the implementation of these materials or procedures

Methodology. The literature search was conducted in various ways. A telephone survey was made of all resources in the Title VII bilingual education support system - universities, evaluation, dissemination and assessment centers, materials development centers,

and bilingual education support centers. Follow up contact was made with those identified school districts developing Spanish bilingual social studies materials

A computer search was initiated at both the National Clearinghouse for Bilingual Education and the ERIC Clearinghouse for Social Studies/Social Science Education.

Relevant materials were ordered from publishers. Site visits were made to curriculum libraries at local school districts, universities, and private educational consulting firms. All local bilingual program coordinators were interviewed about the history of materials development in their district and knowledge of relevant materials.

Results of Search. A review of the literature verified that most bilingual materials being used are developed by individual teachers and a select few are disseminated through professional journals, newsletters, and conferences (such as TESOL Quarterly and Bilingual Journal).

Materials developed by school districts via federal grants tend to be designed to meet the needs of their specific population and are often supplemental, not basal curriculum.

Materials from the Title VII materials development center are the most generally used and widely disseminated.

Most teachers supplement their social studies teaching with materials developed by other government agencies (police), private industry (the phone company), or private educational groups (World Affairs Council).

Most publishing companies have not developed Spanish bilingual social studies materials for middle school grades.

There is a wide variety of instructional materials available and many resources to draw from, but, for the most part, materials:

- are only supplementary and not basal
- are basal but need supplemental materials
- are not widely disseminated
- may be appropriate only for those students in the region where materials were developed and not necessarily for urban LEP populations
- are appropriate only for LEP students learning Spanish as a second language
- are out of print
- are in Spanish only and in a format not conducive to bilingual or ESL teaching strategies in the content area, or
- emphasize content area concepts and skills but not second language acquisition
- may not accommodate the immediate survival needs of newcomer students

While the literature search surfaced some very good materials that are available and are presently being used, most are lacking in one or more of the above areas. As of this writing, there are no instructional materials that are specifically appropriate for a Spanish-speaking LEP student in an urban middle school bilingual social studies class.

The results of the literature search indicated that it is important to keep the following factors in mind while developing bilingual instructional materials. Each of these factors was found to be lacking in one or more of the instructional materials found:

1. Statement of learning objectives, instructional strategies and teacher's guide.
2. Student activities and student achievement measurement.
3. Continuous process of dissemination.
4. Appropriateness for urban LEP Hispanic students.
5. Consideration of first language fluency.
6. Design for second language learning.
7. Design for bilingual teaching strategies in the content area.
8. Emphasis on content area concepts and skills.
9. Ability to meet the immediate needs of newly-arrived immigrant students.

Of the materials development systems found, all are from within the Title VII network. In order to be applied in a step-by-step fashion at the urban local educational agency (LEA) level of bureaucracy, all of these systems would have to be modified. In

most LEAs, school personnel may lack knowledge in the areas of field-testing, evaluation and content area translation which are necessary to the development of bilingual ESL materials. Steps would need to be added to facilitate feedback from students, community and administration. Consideration must also be given to (a) the past history of materials development at the LEA level, (b) personnel available, (c) training of personnel prior to the development process, (d) a need to standardize translation, (e) the individual goals of a single LEA bilingual program, and (f) setting up a network of teacher-training after the field-test, etc. All of the systems have potential and can serve as models for this project's creation of an appropriate Process/Approach.

CONCLUSIONS OF THE TECHNICAL TEAM

Priorites

It was decided by the Technical Team that the following priorities must be considered for any bilingual instructional materials development. The kinds of materials needed are:

(1) Materials that the students can relate to in terms of their life experiences, and stage of development;

(2) Materials that would stress content acquisition (rather than being a replication of E.S.L. instruction);

(3) Materials that could be used with various class compositions (e.g., some classes have students who are pre-literate in Spanish as well as English; most classes have a combination of both variables);

(4) Materials which can be used by the skilled teacher and the less experienced teacher as well (because of a shortage of bilingual instructors some teachers are assigned to teach content areas for which they are not formally trained);

(5) Materials which are interesting and impart real information to the student.

Focus of Bilingual Materials Development

After three months of deliberation, the Technical Team decided to focus bilingual curriculum materials development on creating a unit based on the topic of immigration to be used in 8th grade Social Studies (prescribed by California Curriculum guidelines as U.S. History). This topic is one which intimately relates to these students and which is an integral part of any study of United States History. The unit is to be a supplementary text which can be utilized flexibly in conjunction with any standard text. However, the unit is to be designed in such a way that, if necessary, it can be used on its own (depending on teacher and classroom need). The unit envisioned is to be as sensitive and involving to the immigrant student as possible; further, it is to contain ideas and recommendations for associative activities.

THE PROCESS FOR DEVELOPING BILINGUAL CURRICULUM AND TRAINING MATERIALS IN AN URBAN SCHOOL DISTRICT

INTRODUCTION

This section includes a description of a recommended process for the development of bilingual/ESL curriculum and training materials in an urban school district. The process described is based on discussions by the Technical Team and with key personnel in the San Francisco Unified School District. This process is, at the present time, theoretical and will be modified based upon our experience with implementation after this report is submitted.

This section is organized chronologically. What is described is a series of steps to be undertaken by an urban school district in developing bilingual curriculum and training materials. These steps, described below, are:

A. Assess Needs and Review Past Efforts

B. Determine a Structure and Procedure for Deliberation and Decision-Making

C. Identify Key Issues/Variables and Their Interaction

Once these steps have been taken the district can implement the process (develop material using the process) and then evaluate both the process and materials thus developed.

ASSESS NEEDS AND REVIEW PAST EFFORTS

The initial step in the process requires the planning and accomplishment of two tasks: (1) Needs Assessment and (2) Review of Past Efforts.

Needs Assessment

Actually, several needs assessments must be undertaken. Given the complexity of conditions under which urban schools function and the bureaucratic nature of school district organization, participants in the system -and their needs- are constantly changing. Of paramount importance is the assessment of student needs for bilingual curriculum materials.

Students: The needs of bilingual students will be a definitive factor in the design of instructional materials. To be assessed will be the students educational background, general language proficiency, cultural experience, and socioeconomic background. Are most of the students from a rural area or urban area in their home country? Are they from an upper middle class background with some exposure to Western culture? Or are they from a lower class background that has been culturally insulated? From this one can determine the kinds of cultural conflicts the students are experiencing, with school peers, at home and in the community.

Have they attended school? If so, what kind? What grade level? In what subject areas do students excell or favor? From these questions one can assess the extent of the student's grasp of basic academic and life skills/experiences.

What has been the student's life experience? Is he or she an immigrant by choice or a refugee by circumstance? What is his/her family and living situation? In this way, the emotional and psychological needs of the students can be profiled.

Are students literate in their first language? What is their level of first language proficiency, both oral and written? Answers to these questions can help to determine the way in which the first language will be used in materials to be developed as well as the types of learning activities to be planned.

These are basic questions that can define the student audience for these materials. Many of these questions can not be answered by statistical data, but only by observant and sensitive school-site staif over three or four months of intensive teaching. The SFUSD Technical Team felt all of this information was important to keep in mind while designing their bilingual/ESL materials.

Teachers: Of similar importance is the assessment of teacher needs. Many teachers know what materials are available for classroom use and the extent to which these materials are adequate, adaptable, durable, and timely. However, many teachers have little knowledge of

available bilingual materials, especially if the teachers have been moved around frequently or found themselves teaching in a subject area or grade level with which they are unfamiliar. Moreover, teachers use materials in diverse ways. For some, the lesson is guided by the text or supplemental material. For others, an experiential approach may relegate curriculum material to a minor role in the instructional process.

Others: A third area for which needs assessments are indicated is among (a) parents, and (b) educators at the level of schooling the students will enter next. It is rare that school districts conduct needs assessments among parents, community organizations or businesses to determine their needs from the educational system. Such an effort is often seen as peripheral to the focus of education even though valuable insights can be gained from these "external" perspectives. However, it is quite feasible for a school district to obtain an assessment of needs from educators at the high school level regarding their expectations of students in middle schools.

The benefit of all these perspectives is the development of a broader picture of (a) educational goals, (b) the resources which may be available outside the school or classroom, and (c) how school-based learning may be better integrated with the values, conditions and images found in the student's home and community.

Review of Past Efforts

One facet of the complexity of the urban school district is the difficulty of documenting the great variety of ongoing problem solving activities. This problem is partly attributable to the often inconsistent ways in which the bureaucracy is organized to address and resolve issues. A frequent example is the overlap of units concerned with special functions (e.g., staff development, bilingual education, curriculum development), units focussed on different student age levels (e.g elementary, secondary) and, in most large urban districts, geographical area units. For example, efforts to develop science bilingual curriculum materials in Tagalog may involve the district's bilingual education department (though not the curriculum department), elementary division (though not the secondary division), and Central City Area (though not the Northwest Area). Many parallel efforts may be taking place within an urban school district and remain unknown to educators who function within other subdivisions.

In recent years, the possibility has increased that important curriculum development activities may be going on unknown to other interested parties within the same school district. This increase is a result of the relationship between curriculum development and externally funded programs. When school districts receive program funds, federal and state agencies require the establishment of discrete projects to implement each program. While it is often possible to operate such a project under the umbrella of a larger

unit within a school district (such as the Curriculum Department or Bilingual Education Unit), the implementation of the project usually remains isolated within that unit and little diffusion takes place through other interested divisions of the school district. Given the short duration that these projects are expected to exist, it is no wonder that coordinating and institutionalizing efforts receive low priority from district administrators. The uncertainty of project funding makes prior planning a potential waste of time; and once a project is funded, the pressure for accountability is to the funding agency rather than within the school district.

What all of this means is that there is often more curriculum development experience in a school district than meets the eye. A critical antecedant for bilingual curriculum materials development in an urban school district, therefore, is a careful survey of existing activities within the district's many subdivisions. While it is possible that direct evidence of prior effort may be lacking, a survey should gain important data of another kind, mainly staff perceptions of prior efforts and their consequences.

Staff perceptions of efforts at educational development and innovation have an important impact on the amount of energy and committment educators will invest in such efforts. Urban school districts, not unlike other large bureaucracies, generate their own folklore about what works, what's important, whether an activity is trivial and nonessential, or whether it will bring about change.

In the process of developing bilingual curriculum materials review of past efforts is needed to uncover information about the context of prior attempts at educational innovation if present efforts are to have a chance to succeed.

DETERMINE A STRUCTURE AND PROCEDURE FOR DELIBERATION AND DECISION-MAKING

The complexity of urban school districts mentioned above requires a well thought out structure for discussing and deciding upon the process for bilingual curriculum material development. Major issues include the nature of the deliberative unit, its authority, scope, and composition. While each school district must determine the resolution of these issues, several suggestions are possible based on the experience of this project.

The deliberative unit should be small (no larger than ten members) and receive its authority to function from the Superintendent. It would be preferable for this authority also to extend through the appropriate subdivisions of the school district (curriculum division, bilingual department, etc.).

The scope of this body should be clearly limited. It may not be as important what these limits are as much as it is necessary for the deliberative unit's members to know how they are to focus their efforts. For example, a determination must be made about language(s), subject area(s), and grade level(s). Furthermore,

the deliberative body must be clear on whether its role is limited to raising issues, making recommendations, issuing reports, implementing recommendations, etc.

Composition of this body can vary tremendously but we recommend that half be classroom teachers of the subject, grade level and language in focus. Other members could include personnel from bilingual education, curriculum development, staff development, and counseling, and parent or community representation, if possible.

A vital need of this body will be time. The time needed includes several kinds: (1) preliminary time to develop a working relationship and consensus on procedures and priorities; (2) meeting time which recognizes prevailing pressures; and (3) extended time to deliberate, review and make decisions.

IDENTIFICATION OF KEY ISSUES/VARIABLES AND THEIR INTERACTION

This section of the report will expand upon the work of the Project Technical Team (described in Section II above). This information was extracted from technical team meetings and expanded on by staff.

There are two ways in which "process" information is being presented. The first is an attempt to identify key issues or variables which are to be treated sequencially. The second is an attempt at a process/approach flow chart identifying "process," "task," and "product."

Key Issues/Variables

The many issues discussed by the Technical Team have been reduced to eight in this working draft:

a) Existing Curricula Guidelines

b) Student Needs

c) Teacher Needs

d) Existing Resources and Materials

e) Instructional Materials Needed

f) Production Capabilities

g) Implementation

h) Adaptation and Evaluation/Modification

a) Existing Curriculum Guidelines

Even though student needs were determined to be the issue of first priority, it was recognized that there were legal and administrative requirements which had to be viewed as a foundation to all succeeding efforts. Hence, the first variable to be examined are those curriculum guidelines established by federal, state or district policy and, if applicable, by court actions.

At the state and local level, if specific bilingual/ESL subject area guidelines do not already exist, then the subject area guidelines for the fluent English students should be modified and adapted to meet the needs, and use the existing knowledge, of bilingual students.

This does not necessarily mean limiting the areas of learning, but adding specific language arts skills that can be used as learning tools in the subject area. It can also mean adding cultural components to the subject area that will give meaning, relevance, and familiarity to difficult and abstract concepts.

If there are guidelines for the subject area written for bilingual students, they should also articulate with local and state curriculum frameworks so that bilingual students will be able to meet the regular district and state requirements.

Curriculum guidelines serve as a menu from which to choose topics for bilingual curriculum development.

b) Students Needs

The Technical Team spent the greatest amount of time exploring the needs of students as a variable in the process of developing bilingual curriculum materials. In fact, it emerged that the diversity of the student population was the single most important reason for the urgent need for more effective materials. This was especially true for the middle school population, though it is our belief that similar variability exists among students at other grade levels. Even a brief discussion of the needs of middle school, Spanish speaking, social studies students in San Francisco can be overwhelming.

Some of the variables applicable to student needs are:

Education

(a) amount of formal schooling

(b) educational experience

(c) conceptual development

(d) L_1 competency

- verbal expression
- written expression
- aural comprehension
- reading comprehension

(e) L_2 competency

- verbal expression
- written expression
- aural comprehension
- reading comprehension

Adaptation

(a) length of time in current school

(b) length of time in the city

(c) length of time in U.S.

Social Context

(a)Parents in this city/country

(b)Economic support

(c)Language support

Physical and Psychological Development

As an index of student needs, each variable is significant in its implications for how the student may learn and what materials will assist the learning process. In combination, a fuller picture of the individual student emerges. Several examples from San Francisco's middle schools are indicative of the variation of students and their needs.

> Juan has been in the U.S. for two months. He is 12 years old and was doing high school equivalent work in his "gifted" seventh grade classroom in Guatemala. His parents sent him to San Francisco to live with a cousin because of turmoil in their own country. Juan neither speaks nor reads English. He is very unsure of himself, misses his parents and feels completely uprooted by all the events of the past several months.

> Maria also twelve years old, has been in the U.S. for a little over one year. She arrived here with her mother and three younger children after her father disappeared from his farm during a nearby battle between government soldiers and rebels. Prior to last year, Maria had never been to a school. She attended the Newcomer Center for a year and was able to pick up conversational English fairly well. Despite the fact that she can read neither English nor Spanish she has been placed in a middle school seventh grade classroom.

> Jorge is thirteen years old and has been in the U.S. for four years. His English speaking ability is good but he has difficulty understanding written and spoken English. He has a great deal of difficulty writing English or Spanish and often mixes words from both languages. His eyesight is poor and he appears to be quite small for his age.

These three students, occupying the same classroom, present a profound dilemma to the teacher who has been provided with a single "bilingual text."

c) Teacher Needs

The kinds of teacher needs to be examined in the process of developing bilingual curriculum and training materials include (1) professional knowledge, (2) experience with and understanding of the cultural foundations of the students, and (3) conditions under which teaching is to take place

Professional knowledge

There are four areas of knowledge which have direct bearing on the teacher's need for and use of bilingual curriculum and training materials:

- ability to understand and, where necessary, work in the language of the students
- knowledge of the subject area for which materials are being developed
- knowledge of developmental issues affecting students at their present age
- knowledge of bilingual education theories and teaching strategies.

Experience with and understanding of the cultural foundations of the students

- recognition of students' cultural values and areas of potential conflict with North American values
- ability to use analogies, anecdotes and imagery relevant to students' experiences

Conditions under which teaching is to take place

- student groupings: age, L_1 or L_2 ability, previous knowlege of subject matter
- turnover of students because of late entrance or early exit during the school year,
- stability of school-site bilingual program and staff,
- size of school-site bilingual program,
- appropriateness of facilities for class size and subject matter to be taught,
- availability of funds to supply special equipment or to fund field trips to supplement the materials being developed.

d) Existing Resources and Materials

A key variable in the process of developing bilingual curriculum materials is the identification of existing bilingual resources and materials. Most urban school districts have had a hard time keeping up with academically or commercially produced materials either to catalog or to purchase.

Though many urban school districts have libraries of bilingual/ESl materials, sometimes these same curriculum libraries will only have one set or sample available for borrowing or reference. In our brief literature search, some of the most useful materials for the middle school were not available in class sets, rendering them useless. Accordingly, bilingual students and teachers are shortchanged because they are forced to use ditto material or nothing at all.

The bilingual material that presently exists in the school library may need adaptation or supplementation. For example, the use of the first language may be too difficult or too easy. Appropriate bilingual materials are also needed for newcomer populations, the gifted, handicapped, as well as for bilingual parents.

Another potentially rich resource is the array of material produced in individual schools for and by individual teachers. Hence, a valuable process element is the eliciting of teacher made materials to be assessed and organized for immediate use or adaptation.

Additional sources of bilingual curriculum materials can be found through organizations directed at tourists, foreign business, discussions of international affairs, etc.

e) Instructional Materials Needed

At this point in the process it should be possible to identify gaps which need to be filled by developing new bilingual curriculum materials.

Sometimes the need will only be supplementary or an extension of existing curriculum to other grade levels. Materials may need to be adapted to other language/minority groups. Or a school district may want to develop a basal type of bilingual curriculum. The recommended process/approach for developing bilingual/ESL materials should be applicable to whatever material needs have been identified..

f) Production Capabilities

The accessibility, cost and comprehensiveness of production capability represents a sixth key issue. Among the factors involved here are the systems available in: (1) the school district, (2) universities, (3) commercial printing establishments, and (4) through private benefactors for translation, graphics, printing, duplication, binding and distribution.

Access to production processes in a school district will be governed by policies and procedures regarding approval, time-frames, style, quality, authorship and copyright and, of

course, cost. Production facilities outside of the school district may offer some promise though issues of control, time and cost must be addressed and resolved.

At the writing of this report, this phase of the materials development process has not been investigated by the Technical Team.

g) Implementation

Once bilingual curriculum materials are at the point of being produced, it is important to clarify a series of implementation issues. These include: (1) approval; (2) inservice training (3) dissemination and (4) support.

Approval

During the materials development process all district procedures should have been followed concerning the review and approval of curriculum for adoption and use in the school district. In the absence of a clear policy or procedure for approval of bilingual curriculum material, the deliberating body (Technical Team, Task Force, etc.) should be certain to keep appropriate administrative personnel informed and, where necessary, seek final approval for steps and decisions along the way.

Inservice Training

The issue of planning inservice training for the use of bilingual materials in the classroom is a difficult one. Most of the time, neither the funds nor the personnel are available to provide training. Yet, even if these resources were available, the problem of fitting the training into an inservice schedule would remain since many school districts develop their inservice calendars a semester in advance. However, if the bilingual curriculum materials development process were to anticipate the need for training, there would be a better chance of its actually taking place.

That training is scheduled should seek to be classroom-based and to make use of the material developers as resources. If possible, training materials should be developed simultaneously with the curriculum materials. If this is not possible, then the field test period would be the time for designing the inservice activities and requisite materials.

If regular classroom teachers are assigned bilingual children and asked to work with the developed material, they will need specific inservice on the target language, cross-cultural communication, and second language learning/

teaching strategies. They will need to know about the "silent period" of language learning that occurs with newcomer students and about intercultural learning in the classroom.

Dissemination

A concern raised by teachers in urban school districts is the failure of new materials to "get out to the schools." A plan for dissemination must be included in the process to insure the broadest possible use of the curriculum materials. This is easier said than done since proper channels need to be identified and used; otherwise, extensive efforts will need to be taken through informal channels to assure dissemination.

Support

The extent to which curriculum material moves from abstraction to application depends upon more than the efficacy of the product in helping bilingual students to learn. The product must have support from a variety of sources. First of all, it needs testing and affirmation by teachers in the classroom. Secondly, it needs visability and a clear description in terms of (a) the problem it istrying to solve or the goal it is trying to achieve, (b) the function it is performing (e.g., text, general

supplement, thematic supplement, supplement directed at a specific kind of student), and (c) valuable features such as pictures, activities, cross references, etc.

If the materials are to be used by bilingual teachers who are not teachers in that subject area, the materials may need to be designed as a "how to manual" for those teachers who will be more dependent on specific direction and background information.

Thirdly, newly developed curriculum materials should establish a basis for flexible utilization. At the same time that materials require clear description of purpose and approach, they should be amenable to the practioner's ability to use them creatively and in varying conditions.

h) Adaptation and Evaluation/Modification

This final item in the list of key issues is a difficult one to put in practice.

Adaptation

One concern with adaptation is the imbalance between the need for effective bilingual curriculum materials and the extensive time and cost usually required to create them. Accordingly, it would be highly desirable to develop materials which could be adapted both for other language

groups and for other grade levels. Obviously, there will be semantic, syntactic, phonetic, idiomatic, cultural, and cognitive factors limiting the adaptability of curriculum materials from one language group to another. There will also be major conceptual, experiential and developmental factors inhibiting adaptability from one age group to another. It is our view that, difficult as this may be, a bilingual curriculum materials development process ought to aim at such adaptability.

Evaluation/Modification

The process for developing materials should include an approach for evaluating and modifying those materials. The great need for bilingual materials often structures the priorities so that what is produce after is limited to what will be used in the classroom. Unfortunately, mechanisms to assess, evaluate and modify bilingual materials tend to get lost in the process. One consequence of this omission is the limiting of options when the materials "fall short" of expectations. Too often, developers and practioneers cannot discover precisely what is wrong because, without an assessment process, data become incidental and insufficient for knowing which kinds of corrections to make. As a result, some curriculum materials tend to have short lives.

Assessment measures should begin with teacher responses and include student reactions and achievements. Suggestions should be solicited from teachers and students and, when possible, parents and interested community members. In addition, it would be desirable to seek outside evaluation utilizing more objective measures over a longer period of use. Data resulting from both kinds of evaluation should focus on selected elements of the curriculum material as well as the whole package so that specific modifications may be undertaken. Reassessment could then focus on improvements resulting from specific changes made in the material.

Procedure

The Process/Approach Flow Chart (see below) gives a step-by-step description of a process for implementing bilingual/ESL materials development in an urban school district.The chart depicts a procedure for discussion and decision-making that involves the school district administration, classroom teachers, parents, and community representatives. The following narrative describes each step using numbers to correspond with the item on the chart.

Although the initiative for the needs assessment survey (1) starts with the school district, it can also start with the classroom teachers, school-site administrators, etc.

The feeling of ownership of the materials can be developed by choosing curriculum writers (2) that are representative of the target languages, subject areas, and grade levels. Most importantly, they are teachers who are respected not only at their school site but also by other district teachers in bilingual education.

Another important aspect of the process (3) (4) is to inform administrators, teachers, and parents of the progress being made. Again, this promotes ownership and also takes advantage of available resources, materials as well as personnel, that are in the school district and the community. These resource people can also be asked to review the content, format, and use of languages in draft materials.

The process described is just one of many that can be implemented. This process very carefully delineates the responsibility of tasks and the development of products. Consideration has been given to the bureaucratic steps necessary to demonstrate need for bilingual/ESL materials as well as to the personnel, funds, and time necessary for a thorough and thoughtful materials development process.

Note also that the process does not stop with the finished product or with its final review by the school district or board. In order to have these materials used in the bilingual/ESL classroom successfully by bilingual/ESL teachers, it is necessary to plan for

both an internal or external (through a university) teacher-training program and an organized method of materials dissemination. Further follow-up will be necessary. Monthly or quarterly training/feedback sessions with the targeted classroom teachers can suggest ways of improving the materials development process and modifying and adapting the materials themselves.

For example, in San Francisco Unified School District, the Technical Team has completed the process through step 9, "Select topics for materials development," by meeting on a bi-weekly basis. The team has looked at instructional materials in the selected area, i.e., Spanish bilingual social studies for middle school, and conducted a literature search. The team has also talked with outside community consultants about adolescent development and second language acquisition as well as drawn upon resource people on the Technical Team and in the school district. They have initiated informal research into the area of learning theory and reviewed both state and local curriculum guidelines. Most importantly, the Technical Team conducted in-depth discussions on the needs of both students and teachers.

THE PROCESS/APPROACH FLOW CHART

Implementing Bilingual/ESL Materials Development in an Urban School District

I. Process (School District Responsibility)	II. TASK (Materials Development Group Responsibility)	III. Product
1. Survey district needs.		o Report on instructional materials need in subject areas, target languages, grade levels.
2. Decide <u>who</u> will develop materials	o Form a group with this experience: a. subject matter b. grade level/ learning theory c. community background d. ESL methodology e. bilingual bicultural methodology f. Other	o Send letters to school-site principals, school board members.
3. Provide funds/resources/time	o PLAN meetings; outline tasks	o Schedule of meetings/objectives
4. Hire outside consultants to provide inservice as needed	o Discuss student needs: -academic experience -linguistic background -socio-economic history -psychological/emotional	o Send invitations to teachers/aides/ administrators
5. Provide statistical data on student/ teacher population as needed.	o Develop profile of the student audience or target student. o Discuss teacher needs: -knowledge of age group -subject matter content -Bilingual/ESL methodology -school-site placement -classroom heterogeneity o Develop profile of teacher audience.	

I. Process (School District Responsibility)	II. Task (Materials Development Group Responsibility	III. Product
6. Provide copies of state/ local curriculum guides	o Review curricular guidelines, both state and local.	
7. Provide funds to obtain review copies of instructional materials	o Review both available instructional materials within school district and from outside resources. o List features of those materials most appropriate to the target audience.	
8. Make available information/resources/ personnel to discuss and describe district production capabilities.	o Investigate district capabilities for materials production and reproduction.	
9. State district policy on curriculum implementation	o Find out how instructional materials are implemented in the district, especially: -process of setting up teacher-training and inservice. -process of materials dissemination	
9a. Hire community consultants as needed	o Select topic for materials development. o Brainstorm/list ideas for activities. o Choose & develop <u>important</u> concepts and goals. o Develop scope and sequence. o Match activity ideas to concepts/goals in scope and sequence. o Develop activity outline and learning objectives o Evaluate outline and objectives.	

I. Process (School District Responsibility)	II. Task (Materials Development Group Responsibility)	III. Product
10. Provide test-site in classroom	o Draft and test in classroom. o Evaluate pilot-test.	
11. Provide graphic artist	o Revise, illustrate, prepare teacher's manual, student materials. o Evaluate and rewrite (for field-test or final draft). o Edit	
12. Provide translators	o Translate o Proofread o Field-test (if necessary), evaluate and revise.	
13. Provide typewriters, etc.	o Format for camera-ready copy.	o camera-ready copy of materials.
14. Review materials	o Provide evaluation information from pilot-test.	o results of pilot/field test.
15. Reproduce materials		o instructional materials.
16. Translate into other languages	o Design teacher-training program & training network. o Write suggestions for adaptation and modification.	
17. Publicize inservice		
18. Provide inservice and disseminate materials		
19. Evaluate long-term effectiveness		o Write evaluative report on materials developed

PRODUCTION PHASE - PROCESS APPROACH

Transition

After a full nine to ten months of deliberations by the Technical Team, Review Panel and Project Staff on the formulation of the Process/Approach (e.g., what is most needed for the specified student and teacher population selected from the San Francisco Unified School District, what has been lacking, what is available, language presentation and acquisition techniques, etc.), materials production was finally begun. This was a difficult transition to make: after struggling with the Technical Team to keep them on track and on task to developing the "Process/Approach" during the first six months of the project when they were so eager to just jump in and make up some materials, it became just as difficult to convince them that there had to be an end point to these deliberations. The Technical Team was wonderfully thorough and became totally committed to the analysis, understanding and formulation of the "Process/Approach" model, however reluctant they were in the beginning (until the necessity of the process became understood). Convincing them that we had been scrupulously thorough and had used up our deliberation time was achieved over a period of time, and not all at once according to our time table.

Beginning in April and May, 1983, the Staff and Technical Team scheduled meetings that were to be actual writing and materials production sessions. Goals would be set for the location of student worksheets and corresponding Teacher's Guide sections to accompany limited sections of The Story of California. Very often,

team members would volunteer to draft particular parts of the material in between meetings to bring to the next session. This did not work well: 1) it was not always feasible for the team members to find adequate time for the writing of their "assignments", 2) some seemed to need group impetus to get down to this kind of development. It did not work much better with the group assembled for the express purpose of materials development either. However, reviewing it now, there seemed to be several problems which subsequent groups need to be prepared for. 1) As mentioned before, the group may have come prepared to write and develop materials, but a simple question on the sharing of some small segment developed for our purposes, would, more often than not, spur the team into yet more discussions on "what is needed" and how we should proceed. These discussions were hard to avoid (they often yielded relevant information and insights) and difficult to curtail. Yet they brought us no closer to our development goals. 2) It is often difficult to write and create as an assembled group. There can be too many people to consult with, it can make some less experienced members of the group insecure and inhibited. There are distractions and time is necessarily limited. We attempted to solve some of this problem by breaking into two person teams as much as possible (although in some cases this was impractical - e.g., making a map is a solitary activity). The two person team approach was the most effective system that we tried; the first draft of our materials was achieved primarily through this mode. 3) Probably the most important impediment to team production of the curriculum and instructional materials lies simply in the fact that in a group

such as ours (composed mostly of classroom teachers) not everyone has the experience with or talent for writing textual materials! And certainly, the team's most dedicated effort yielded material of such radically different styles and competence that simple editing was inadequate for making it appear homogeneous in style. Although everyone was dedicated to the effort and trying, the effort was unequal and difficult to coordinate.

The "solution" to this phase of the project appeared only after months of trying to involve all team members in materials production. It is really best to discern earlier on just who has had experience in curriculum writing and who has special skills and high interest in this activity. The larger team is needed for truly fruitful and thorough investigations and deliberations into "what is needed" and the formulation of the model, but a smaller formation is suitable for the actual hands on production.

FINAL PRODUCTION OF INSTRUCTIONAL AND CURRICULUM MATERIALS

First Draft

After several months of working as a full team to develop the classroom materials which the team had carefully targeted and described, we were able to assemble a package which covered all ten chapters of The Story of California, if in less than perfect consistency. What was produced per chapter is as follows:

I Student worksheets (Instructional Materials)

(a) Vocabulary worksheets in English using selected words from the chapter in the form of:

1) Crossword puzzles

2) Matching exercises

3) Fill in the blanks in sentences

4) Word search puzzle

(b) Vocabulary worksheets in Spanish using selected words from the chapter in the form of:

1) Crossword puzzles

2) Matching exercises

3) Fill in the blanks in sentences

4) Word search puzzles

(c) Comprehension worksheets for each chapter in the form of:

1) True-false exercises

2) Matching exercises

3) Short answer question sheets

4) Tests (multiple choice and short essay)

D) Comprehension worksheets in Spanish for each chapter in the form of:

1) True-false exercises

2) Matching exercises

3) Short answer question sheets

4) Tests

E) Map exercises (primarily in English and some in Spanish)

1) Fill-in exercises

2) Answer questions requiring map reading

3) Map assembling

F) Graph exercises (English and Spanish)

1) True-false exercises

2) Assembling and filling-in graphs

3) Simple answer exercises based on graph reading

II Teacher's Guide (Instructional Materials) by chapter which gave focus to the various components listed above. The Teacher's Guide was produced in outline form, with the intent of guiding the teacher through the concepts presented in each chapter and, somewhat less, relating to the specific student exercises. In every case suggestions for further activities and research exercises were presented.

This package of draft materials represented a big effort, but lacked some consistency from chapter to chapter in the student worksheets and lacked the specificity we had hoped for in the Teacher's Guide. Another difficulty we found with the student worksheets was in the area of sequencing them from easiest to most difficult, primarily in the area of language useage.

We decided that we needed to edit these sections thoroughly and condense the format so that there would be material that any student, regardless of ability, ought to be able to handle up to more grade - appropriate, challenging exercise. In terms of the Teacher's Guide, we felt that more specificity was needed there as well, dividing it into pages for focus, rather than addressing the whole chapter at

once. This was desired for the student worksheets as well, because it would give the student more specific chapter focus to aide in his sense of direction. Most of all, we wanted the materials to be chapter relevant and "do-able" for the student, rather than frustrating or vague or fulfilling our objectives only. The Fall and Winter therefore became devoted to reshaping these materials along these critical lines in order to produce the most relevant materials possible for the field testing phase of the project.

Final Draft

The first task was to develop a more efficient, skilled core of curriculum developers. This occurred in a natural way to some extent: those with the most expertise stayed close to the project and kept producing. Nick Bartel, bilingual curriculum developer for the San Francisco Unified School District and the primary author of The Story of California became the central developer for our final draft. He was able to see clearly what was needed and has the experience writing which promoted facility. Roberto Lemus, another team member, has a special interest in geography and skill in making maps and graphs. He was able to continue in this defined role. Manuel Colon, who has taught on every level, and has had experience writing, is particularly focused on promoting excellence in the students' first language, Spanish. He continued working on devising relevant exercises in Spanish for different student competency levels.

Manuel Colon and Roberto Lemus, however, were still only able to contribute on a relatively peripheral basis compared to Nick Bartel because of their teaching schedule. It became obvious that we would require some concentrated, consistent assistance from outside consultants. The instructional materials had been developed to a point where it was clear and definable just what work needed to be done: 1) Nick Bartel and the project staff had refined the chapter student work units for the first few chapters - a format which needed to be followed for the remaining chapters, 2) illustrations, maps and graphs required more experienced artistic attention than anyone on our team or staff could provide - (an important feature of the process model developed by the Technical Team was that whatever materials got developed needed a fairly polished, professional appearance so that the students would feel proud of their work, and that the materials would be comparable to those used by mainstream English speakers). To this end, three consultants were employed: one to assist Nick Bartel in analyzing each chapter and breaking them down into the prescribed work units he had designed for the initial chapters, one to "clean up" and present the layout in a more professional form, and a final consultant (an artist) to help supply quality illustrations.

This additional consulting staff was assembled in late Fall and scheduled tightly to produce a final, finished product. The consultants were first convened for a full orientation in order to glean a thorough understanding of the project's goals and objectives; then specific tasks and deadlines were assigned. Two

of the consultants already knew of the project and had been employed before, the artist was new. These three consultants were hand picked because of their experience and expertise. They worked directly with the Head Developer, Nick Bartel and with the Project Director and Staff on a consistent, no-lag basis in order to assure continuity and conformity to our goals.

Thus, with the help in special areas from consultants, the two Technical Team members and Lead Developer, Nick Bartel, were able to proceed without lapse on the development of these revised materials. Before this, assembling the working team had been difficult to do for any consecutive period and momentum was sometimes lost.

It has been our experience that it is of critical importance to assess the strength and talents of the project's Technical Team to determine which members are genuinely interested in and capable of the actual writing of the instructional and curriculum materials. Not everyone can write; not everyone is comfortable with this phase or necessarily experienced at all. Also, there is the issue of producing materials that have a stylistic and linguistic consistency, which suggests limiting the number of actual writers. It seemed to us better to limit the number of writers than to be faced with a potentially impossible task of editing disparate styles into one voice and possibly incurring the problem of having to discard or rewrite sections written by inexperienced team members. This is a delicate situation and one that we encountered with our first draft. Writing should be centralized, limited to a small,

compatible team and given a concentrated, realistic, "cleared" period of time in which to write. Consultants or special resource people can be useful if there are not sufficient resources within the original team composition.

SELECTED MAJOR ISSUES

INTERNALIZATION AND ADOPTION

There are always critical steps that must be taken prior to making any new human services effort a viable one. In change-agent demonstration programs, internalization is one such critical area. Two very important phases within these steps are adoption and implementation.

The second condition necessary in the adoption phase is that the project being considered be viewed as a means to asssisting in solving local problems. When this condition is in existence during the initial stage, the people who will eventually be involved with the program will adopt the demonstration as an important vehicle in helping them meet local needs. This establishes a valid and viable legitimacy for the new project.

In far too many cases, however, the opposite occurs. Many demonstration projects are adopted out of a sense of opportunism. The program is merely adopted for the Federal dollars it will generate and not for any local problem it may help alleviate. History has shown that when new projects are adopted with this kind of opportunism, they do not prove to be as successful in terms of longevity and problem solving

strategies, as when projects are viewed as an agents of assistance. Projects initiated out of opportunism usually are not central to the community's educational objectives and do not receive the sufficient institutional support or encouragement necessary for success.

In summary, there two very important conditions to be met during the adoption phase:

1. comprehensive involvement and input, and
2. attitudinal views and values that relate to the proposed project as a possible means for alleviating local problems.

Adoption Phase

The initial manner in which a demonstration effort is introduced can clearly increase the chances of the success of its successful implementation. During the primary stages of ascertaining whether a new demonstration project should be undertaken, two conditions are essential to the promotion and development of such an effort: comprehensive involvement/input and a belief that the program can solve problems. The more people included in the decision-making process for program adoption, the more likely the community response will be receptive, supportive and certainly broader.

Too often projects are adopted via a rubber stamp process. Representatives, whose signatures are imperative, sign, not really understanding the scope of the project. This can indeed lead to disaster, especially if those same representatives are called upon at some future date. It is important that all who provide the initial input have a depth of awareness and understanding.

Internalization Phase

As discussed earlier, internalization represents the adoption of demonstration program services into an existing educational services system. In the case of the Process/Approach, it represents the situation in which the local school district develops ownership of the demonstration and continues it without the support of federal funding. The degree of local ownership and extent of acceptance of the demonstration project, after federal funding terminates, is largely determined by the existence and quality of the previously stipulated conditions.

Internalization does not happen after the implementation phase; it occurs concurrently with implementation of the demonstration effort. And the process of internalization entails interaction between all who are involved with the demonstration effort. This interaction begins with the advent of the demonstration project's being considered for acceptance into the community (adoption phase), and continues throughout all phases.

While the demonstration's project director is important for facilitating the many implementation strategies, this position

is often only funded during the demonstration period. The school principal therefore, becomes the key figure in the process of internalization, particularly at the end of the demonstration effort. A substantial body of research validates this and further indicates that the principal must be able to:

- o create a climate of acceptance for the demonstration project and what it represents;
- o lend moral and organizational support to the demonstration effort;
- o provide legitimacy to the project throughout the system; and
- o help move the demonstration project from a "special program" status to an integral part of the total system.

These conditions are vital to cultivating the climate of acceptance for internalization throughout the school, community, and the district. Without such support mechanisms, the likelihood of internalization is greatly diminished and, also the overall implementation of the program will be impaired.

Demonstration projects that experience a high degree of internalization have financial, organizational and political commitment. The political commitment is extremely important, for there is always need for school board approval of new projects. Demonstration projects tend to receive school board approval without much difficulty; but it is imperative to keep uppermost in mind that, with the end of Federal funding, the special protection of the project diminishes greatly and it

becomes subject to close scrutiny by the board. For the project to survive and continue, a new legitimacy in the system's political arena is required. The project must rid itself of the "special" status and be viewed as an integral part of the total system. That level of success can be obtained when the project is looked upon as AFFORDABLE, IMPORTANT TO SYSTEM PRIORITIES, AND POLITICALLY ACCEPTABLE.

Projects successful in internalizing, PLAN THEIR EVENTUAL INTERNALIZATION IN ADVANCE. Broad based support must be mustered for the project's internalization. Support must start early and, as previously stated, the school board is vital to that support.

Communication with the board must be continuous so they are kept informed at all times. It is also important to keep in mind that systems of support are available through parents, staff, superintendents and other community members. Therefore, the principle of open and continuous communication applies to these systems, particularly with regard to the parents. That parents' support is critical to the success of a demonstration project is documented throughout the research literature.

Too often, the error is made by all concerned in assuming that internalization is automatic and will "just happen." There is nothing automatic about the process and when it is carried out, it is important to remember: The key to effective internalization is for administrators and various district officials to see internalization as a process of "remobilization"

and "reimplementation." They must realize that the continuation of a change-agent project requires the early, active and continuous nurturing of school district managers.

IMPLEMENTATION POLICY

When a new project passes the adoption phase and is accepted into the existing educational services system, the next phase is to apply implementation strategies developed by the project while respecting the district's established guidedlines. It is important to remember that there will be a greater chance for successful implementation and internalization with consonance between the values, goals, and objectives of the new project and the existing system.

With the implementation of the new project within the established school system, varying degrees of change are inevitable. Any change involving a part of the system, either directly or indirectly, affects all other aspects of the system; consequently, mutual adaptation is critical. This means that all parties involved must, to lesser or greater degrees, modify their formal and informal organizational relationships. Those functioning in relationship to the organization within the system must make the modifications and alterations required in such areas as communications, culture (climate), role relationships, and collaborative efforts.

History has shown that demonstration programs that do not experience a high degree of success in implementation have similar characteristics. They are:

- o lack of central direction;
- o lack of coordination;
- o absence of central definition;
- o low local community/agency support; and
- o no mechanism for the resolution of group conflict.

Successful implementation tends to rely on several conditions. The degree to which these conditions exist will more than likely influence the degree to which successful implementation will take place. Although not inclusive, the following represent vital conditions during the implementation phase:

1. LEADERSHIP, in the form of a strongly focused project director and a supportive school principal, is critical to effective implementation.
2. CLARITY OF PROJECT GOALS among all involved is imperative. Personnel will then have an informative profile of the setting and a clear grasp of what implementation and eventual internalization will be.
3. SHARED DECISION-MAKING among personnel in project directives and day-to-day operations gives birth to "ownership." This promotes the sense of belonging, of being important and of making a difference in terms of the outcome of the project.

4. OPEN COMMUNICATION NETWORKS that are free-flowing among all parties involved create awareness and understanding while alleviating the debilitating conditions of isolated maneuvering and countering.
5. POSITIVE WORKING RELATIONSHIPS among all concerned with the project adds to greater collaborative efforts and the ultimate achievement of project goals.
6. ONGOING PLANNING to meet the changing needs of the project is essential. Flexible operating behaviors through adaptive planning augment goal achievement.
7. RELEVANT STAFF TRAINING based upon practical "here and now" issues rather than theoretical concepts is conducive to successful implementation. Training activities conducted in a positive environment are even more productive if accompanied by well executed, administrative support.
8. ACTIVE PARENT INVOLVEMENT in the home, school and the community which is directed toward the goals of the project enhances the chances for successful implementation.*

The successful demonstration program must occur as a result of very specific, well thought out, and timely implemented strategies. Developing these strategies means a) considering the probable long-range consequences of proposed change on all those involved; b) identifying potential sources of immediate/future resistance and support; and c) systematically implementing a planned course of action/interaction.

Thus to conduct the program in an effective manner suggests that the following ingredients should be continuously implemented:

- o a program design that clearly delineates goals, objectives and strategies;
- o in-house evaluation (ensures that the strategies being implemented are taking the project in the direction of stated goals and objectives);
- o program redesign (a demonstration program is perpetually in the process of "becoming" through revision and validation); and
- o. nurturance of strong management support relationships.

ADAPTATION:MECHANICS

After implementation of this process/approach and the evaluation of the resulting materials, a need can be anticipated for these same type of materials in other areas. How does an urban school district gain even more benefits from this materials development process, so that similar materials can be developed for students and teachers in other language groups, in other grade levels, and in other subjects? How can this be done with a moderate investment of personnel and monies?

1) Other Language Groups. Adapting instructional materials for use by other language groups does not mean translation only. The rationale for the use of the first language in the basic material

to be adapted should be known and clearly stated. The cultural concepts of the other language groups that can be integrated into the basic material must also be noted.

These questions need to be asked:

(a) How was the first language used in the basic material? Was it used to <u>introduce</u> concepts and vocabulary words or to <u>clarify</u> the English? Was it used in giving directions? Was it used during class discussions? Should the other languages be used the same way?

(b) Can the vocabulary words and concepts be translated into the first language? IF not, can analagous terms or experiences from the culture be used as examples?

(c) What aspects of the first culture can be integrated into the material, especially those that can help in the understanding of terms and concepts?

(d) Should the same amount of first language be translated as in the basic material? Or is only a vocabulary list necessary?

2) <u>Other Grade Levels.</u> Adapting bilingual/ESL materials to other grade levels suggests that an overall scope and sequence of skills and concepts for each grade level already exists or must be developed. Then these questions can be asked:

(a) What level of basic skill, conceptual, and cognitive development does the student come in with? Do certain basic skills and concepts need to be introduced and reinforced before these instructional materials can be used?

(b) How will the instructional materials themselves be adapted? How will the use of first and second language differ from its use in the basic material? Will the amount of new vocabulary, skills, and concepts decrease or increase? Will there be more or less learning activities, enrichment activities, or homework? Will the content or level of any reading material change? Will the content and format of the student handouts change?

3) In Other Subjects. This process/approach can be used to develop bilingual/ESL materials in other subject areas. Initially, the technical team should reflect a background of innovative classroom experience in the subject area. Outside consultants can be drawn from those who work in the urban community where the students live, as well as from the private sector. This group should also be able to provide materials and resources outside those already available in the urban school district.

Some research must be done to discover the bilingual student's experience with the subject matter in his home culture. For example, do not look just for the obvious uses of solar energy, but also for the analagous. The construction of many homes in

different cultures demonstrates ways in which the indoor temperature is made more comfortable. This is usually done by the type of materials used and the specific architectural features. The student's home culture will reflect his inherent experience with the subject matter.

Research must also cover the use of the first language in discussing the subject matter. If the bilingual students know the subject matter, it will probably not be in academic terms, but in current, contemporary terms. Look over current periodicals in the first language and interview those of similar culture who work in these subject areas to find terms familiar to the bilingual student.

ADAPTATION: CHECKLIST

Adaptation, when done with sensitivity to the needs of the bilingual bicultural student, requires an investment of time and resources. On the next page is a very brief checklist for adapting activities, in the areas of learning style, subject matter, culture, and language development. This checklist can be used as a basis for adding more items of concern and interest when adapting bilingual/ESL materials.

CHECKLIST FOR ACTIVITY ADAPTATION

Activity Model: Bilingual-ESL/Cross-Cultural

A. Learning Style

____1. Is the activity experiential?

____2. Does the activity utilize group work? pairing? individualized work?

B. Subject Matter

____1. Are skills (measuring length, writing a letter, etc.) taught or reviewed? If so, what?

____2. Does the activity have a general concept (e.g., knowing the six nutrients for a healthy diet) that can be reinforced and thematically developed in subsequent activities?

C. Culture

____1. What culturally-related knowledge, attitudes, values, and ways of learning can be generated from activity?

____2. How will these cultural aspects be developed and integrated within the activity?

D. Language Development

____1. What language skills are being developed within the context of the activity?

How can these skills be further developed?

____2. What vocabulary words are being generated from the activity? Has the amount and use of new vocabulary words been controlled?

____3. Does the activity incorporate any ESL teaching strategies? (e.g., Total Physical Response, slot drills....)

____4. What ESL sentence structure occurs naturally within the context of the activity?
How will the students develop the use of this sentence structure?

____5. Does the activity incorporate any bilingual teaching strategies? What specific teaching strategy will you emphasize in this activity?